

DOD: 10-11-04		<p>MALKIA DILLARD, Administrator with Full IAEA without bond, is Petitioner. Petitioner states she is the sole heir and waives accounting.</p> <p>I&A: \$42,565.84 POH: \$0</p> <p>Administrator (Statutory): Waived Attorney (Statutory): Waived</p> <p>Petitioner states the creditor's claim in the amount of \$24.32 filed by the Revenue Reimbursement Division of the City of Fresno on 12-5-06 was paid from Petitioner's personal funds.</p> <p>Petitioner states all of the assets of the decedent were under \$43,000.00. The assets consisted of bank accounts and an investment account which were transferred prior to the decedent's death to either joint tenancy or solely in the name of a local attorney. One of those assets involved the sale by the attorney of stock which resulted in IRS assessing more than \$25,000.00 in taxes. As a result the IRS levied against the bank accounts of the decedent in 2006 after his death. The Administrator filed a lawsuit against said attorney which resulted in settlement and payment of the assets directly to Petitioner as the decedent's daughter (contents of a safe deposit box) in addition to a \$3,000.00 settlement. Receipt filed 11-3-08.</p> <p>Petitioner states during administration, counsel for petition was also able to obtain a full refund from the IRS in the approximate amount of \$29,000.00 on a levy mentioned above. The refund was paid directly to Petitioner as the sole heir by the IRS.</p> <p>Petitioner states the entire value of assets listed on the I&A (\$42,565.84) was paid directly to Petitioner and an ex parte petition to terminate the probate was sought since no assets came into the estate, but it was denied.</p> <p>Petitioner requests that: 1) Administration be brought to a close without accounting; 2) All acts and proceedings of Petitioner as personal representative be confirmed and approved; 3) That the waiver of statutory attorney fees and commissions be approved; 4) That payment of the decedent's assets directly to Petitioner as a result of the lawsuit and IRS refund be approved; 5) That distribution of any other property not now known or discovered be made to Petitioner as sole survivor of the decedent; and 6) that any further orders be made as the Court considers proper.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 2.</p>	
Cont from 030514, 052114				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
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<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			X
<input type="checkbox"/>	Order			X
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<input type="checkbox"/>	FTB Notice			

Reviewed by: skc

Reviewed on: 6-26-14

Updates:

Recommendation:

File 1A – Gainous

NEEDS/PROBLEMS/COMMENTS:

1. The Court may also require clarification as to the Administrator's failure to close the estate within a reasonable time frame.
2. Although I&A includes total assets of \$42,565.84, Petitioner now states that no assets were received into the estate: The \$3,000.00 settlement, the \$29,000.00 IRS refund, and the contents of the safe deposit box were paid directly to the Petitioner. However, this does not account for the other assets inventoried (cash accounts totaling over \$10,000.00) and further appears to be an inappropriate and unauthorized distribution, since the estate was opened in order to pursue the assets, and once received, should have been received by the estate.

Need authority for receipt outside of the estate.

3. Regardless of what is on hand at the present time, the estate did recover assets that were distributed, appropriately or not, to the Petitioner as the sole heir. Therefore, the filing fee for this final petition of \$435 is due.
4. Receipt filed 11-3-08 indicates receipt of various personal property items that were not inventoried or valued, including jewelry, antique coins, other). Personal property must be appraised by the probate referee. Probate Code §8900 et seq.
5. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing pursuant to Probate Code §1252 and Request for Special Notice filed 12-8-06 on County of Fresno Revenue Reimbursement Division.
6. Petitioner States the creditor's claim of \$24.32 was paid from her own personal funds; however, no allowance was filed by the petitioner, and no withdrawal was filed by the claimant (County of Fresno).
7. ~~Petitioner does not address notice to the Director of Health Care Services pursuant to Probate Code §9202(a). If notice was required but not completed, continuance for proper notice and time for response is necessary. DHS has four months to respond.~~

Update: Notice of administration was sent to DHS on 3-7-14. Thereafter, DHS filed a Creditor's Claim for \$28,595.99 and a Request for Special Notice.

Therefore, need proof of service of Notice of Hearing on DHS with a copy of this petition at least 15 days prior to the hearing per Probate Code §1252.

8. Need order.

	MALKIA DILLARD , Administrator of the Estate of David Lee Gainous, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Assets were distributed to Petitioner, whether or not appropriately, as a result of administration. See Page 3A. Therefore regardless of the current status of the estate, fees are due. <u>Therefore, need filing fee of \$435.00 for Petition for Final Distribution filed 12-4-13.</u>
	Petitioner filed a Request to Waive Court Fees on 12-4-13 that was denied by the Court on 12-4-13.	
Cont. from 012214, 030514, 052114		
Aff.Sub.Wit.		
Verified		
Inventory		
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Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc Reviewed on: 6-26-14 Updates: Recommendation: File 1B – Gainous

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Guardian)

(1) First and Final Account and Report of Successor Guardian; (2) Petition for Allowance of Compensation to Successor Guardian and her Attorney; and (3) for Distribution

Age: 18 years	PUBLIC GUARDIAN , Successor Guardian of the Estate, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Cont. from	<u>Account period: 9/3/2013 – 5/1/2014</u>	
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$118,331.46	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$118,195.48	
<input checked="" type="checkbox"/> Inventory	Ending POH - \$100,667.46 (all cash)	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Successor Guardian - \$199.28 (per Local Rule 7.16(D), itemized at Exhibit B)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$600.00 (per Local Rule 7.16(A), for 4 hours @ \$150/hour, from 7/31/2013 to account;)	
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input checked="" type="checkbox"/> Sp.Ntc.	Costs - \$461.00 (filing fee, certified copies)	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	Petitioner prays for an order that:	
<input type="checkbox"/> Duties/Supp	1. The Guardianship of the estate terminated on 2/15/2014, the minor's 18 th birthday; and	
<input type="checkbox"/> Objections	2. The First and Final Account and Report of the Guardian is approved, allowed and settled;	
<input type="checkbox"/> Video Receipt	3. Petitioners compensation and attorney fees are authorized; and	
<input type="checkbox"/> CI Report	4. After payment of allowed commissions, fees and costs, distribution of the remaining estate of \$99,407.18 be made to the former minor, MATTHEW FULCHER .	
<input checked="" type="checkbox"/> 2620		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Reviewed by: LEG	
	Reviewed on: 6/27/14	
	Updates:	
	Recommendation:	
	File 2 - Fulcher	

(1) Second and Final Account and Report of Conservator and Petition for Its Settlement; (2) for Approval of Caregiver's Compensation, (3) for Approval of Attorney's Fees, (4) for Termination of Conservatorship, (5) for Final Distribution of Conservatorship Estate Pursuant to Probate Code 13100 and (6) Discharge of Conservator and Surety on Bond

DOD: 04/30/14		JOHN DURNYA , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need accounting for the period subsequent to decedent's death (Probate Code § 2620(b).)
		Account period: 02/22/14 – 04/30/14	
		Accounting - \$160,321.27	
		Beginning POH - \$142,591.74	
		Ending POH - \$98,505.77	
Cont. from		Conservator - see below*	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$2,500.00 (ok per Local Rule)	
<input checked="" type="checkbox"/>	Verified	*Petitioner states that in his First Account, he requested approval of monthly payments in the amount of \$300.00 to himself and \$300.00 to Christopher Durnya for caring for the conservatee. Petitioner also requested payment of \$3,000.00 to himself and Christopher Durnya as reimbursement for payments from 05/2011 – 02/2012. The Order settling the First Account signed 04/23/12 ordered only Christopher Durnya receive the payments and reimbursement. Petitioner mistakenly believed that the Court approved his reimbursement payment of \$3,000.00 and ongoing monthly payment of \$300.00 and paid himself accordingly. This error was brought to Petitioner's attention by counsel while drafting this account. Petitioner requests that the court ratify and approve all payments made to Petitioner for conservatee's monthly care from May 2011 to the end of the account period.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
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<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting	Petitioner states that he is the sole beneficiary under decedent's will and requests that all remaining assets after payment of attorney's fees and any accrued interest be distributed to himself upon filing of a 13100 Declaration.	
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice	Petitioner prays for an Order: 1. Settling and allowing the second and final account; 2. Approving and confirming the acts of Petitioner as Conservator of the Person and Estate; 3. Authorizing the attorney fees; 4. Directing that the assets remaining in the conservatorship estate be distributed to John Durnya as beneficiary under conservatee's will upon filing of a 13100 Declaration; 5. Terminating the conservatorship and discharging petitioner as conservator; and 6. Discharging petitioner's bond upon filing of an Ex Parte Order for Final Discharge.	Reviewed by: JF Reviewed on: 06/27/14 Updates: Recommendation: File 3 - Durnya

Probate Status Hearing Re: Filing Additional Bond

Age:			NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Additional bond filed 06/24/14</p>	
DOD:				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: JF
				Reviewed on: 06/27/14
		Updates:		
		Recommendation:		
		File 4 - Maffeo		

Probate Status Hearing Re: Filing Additional Bond

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Additional bond filed 06/24/14	
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 06/27/14			
Updates:			
Recommendation:			
File 5 – K. Maffeo			

Second Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators

Age: 41 years		MANUEL CHAVEZ , father, and SUSAN CHAVEZ-LEON , sister, Co-Conservators of the Person and Estate, are Petitioners. Account period: 12/19/12 - 11/30/13 Accounting - \$309,801.00 Beginning POH - \$241,633.00 Ending POH - \$230,127.00 (\$8,127.00 is cash) Conservator - not requested Attorney - \$7,950.00 (per declaration and itemization, for 25.00 hours (reduced from 36.90 hours) @ \$265.00 per hour;) Costs - \$1,035.00 (filing fees, process service fee; certified copies) Bond - \$201,850.00 (sufficient) Petitioner prays for an order: 1. Approving, allowing, and settling the [First] Account and acts of Co-Conservators; and 2. Authorizing the Attorney fees and costs advanced to the Conservatorship during the accounting period; and 3. Finding that the Conservatee is not able to complete an affidavit of voter registration and is not entitled to vote. Court Investigator Charlotte Bien's Report filed 9/10/2013.	NEEDS/PROBLEMS/COMMENTS: Continued from 5/21/14. As of 6/27/14 no additional documents have been filed. Problems include but are not limited to: 1. All amounts listed in the accounting and on the inventory are rounded off. The accounting must include the actual amounts. 2. Corrected Inventory and Appraisal filed on 4/15/14 does not include attachment 2. The property listed on attachment 1 totals \$18,534 and not \$33,621 as listed. Therefore the total for the corrected inventory and appraisal is not \$255,621. 3. Statement of Cash Assets at the beginning of the account lists assets totaling \$19,633. The assets at the beginning of the account period should be the same as listed on the corrected inventory and appraisal. Please see additional page
Cont. from 052114			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
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<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620 X		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

4. *Schedule C, Disbursements*, contains entry on 6/15/2013 for attorney's fees of **\$5,971.00** to Lance Armo for costs of suit against **HOLLY BILLINGS** for default on loan. Court may require further information regarding the nature and character of the loan, and justification for these attorney's fees having been paid from the Conservatorship estate in contravention of Probate Code § 2647, which provides that no attorney fees may be paid from the estate of the Conservatee without prior Court order. The estate of the Conservatee is not obligated to pay attorney fees established by any engagement agreement or other contract until it has been approved by the Court. [Note: *Schedule A, Receipts* shows entry dated 6/15/2013 for receipt of **\$9,168.00** in proceeds from collection of judgment against Holly Billings for loan default, resulting in receipt of **\$3,197.00.**]
5. Disbursement schedule includes **\$781.00** for dining out from 12/1/12 – 11/30/13. Disbursement must include the nature and purpose of each item and should not be listed as a lump sum.
6. Disbursement schedule includes a payment of **\$608.00** on 1/30/13 to AT&T. Court may require clarification for this large payment.
7. Petition asks for attorney fees totaling **\$7,950.00**. Attorney fees appear to include duplication of work by the attorney and the paralegal. For instance billing statement includes time for the attorney to prepare all the pleadings and also for the paralegal to prepare all the pleadings. The billing statement includes .30 hours (\$74.50) for the attorney to prepare the Duties of Conservator. In addition the billing statement also includes paralegal time of .20 (\$5.00) to prepare the same form. The only thing that needs to be prepared on the Duties of Conservator form is the case name and case number. The billing statement also includes time to prepare a Petition for Exclusive Authority to Give Medical Treatment that was filed at the same time as the Petition for Appointment of Conservator. This was an unnecessary petition in that the request can be made in Petition for Appointment of Conservator. The fees also include time for the preparation of the amended petition.
8. Need care facility statements for Sierra Vista Skilled Nursing Facility. Probate Code §2620(c)(5).

Note: Court will set status hearing as follows:

- **Wednesday, January 28, 2015 at 9:00 a.m. in Dept. 303** for the next accounting.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.

Atty Janisse, Ryan M., of Gilmore, Wood, Vinnard & Magness (for Petitioner Michael Perez)

**(1) First and Final Report of Administrator on Waiver of Account and
(2) Petition for Final Distribution and for Allowance of Compensation to
Attorney's for Ordinary Services**

DOD: 10/30/2013	MICHAEL JOSEPH PEREZ , son and Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> <i>Petition</i> does not contain a statement pursuant to Probate Code §§ 216 and 9202(b) regarding notice to the Director of the CA Victim Compensation and Government Claims Board. Petitioner is the sole heir of the estate and such notice appears unnecessary; however, for future reference it should be noted that the <i>Petition</i> should so state.
	Accounting is waived.		
Cont. from	I & A	— \$209,490.53	Note: Pursuant to Local Rule 7.6.1 (F), the proposed order has been altered such that the Page 4 containing only date and signature lines has been removed, and date and signature lines have been inserted on Page 3 of the proposed order for the Court's signature. 1. Proposed order does not comply with Local Rule 7.6.1 (A) and (D), providing that all probate orders must be complete in themselves, setting forth descriptions of property, monetary distributions stated in dollars, and shall be drawn so their general effect may be determined without reference to the <i>Petition</i> on which they are based. Paragraph 8 of the proposed order includes the real property, but Paragraph 9 states only that the remaining property in the hands of the Administrator shall be distributed to Petitioner, without describing the cash and vehicle property distributions to him. Need revised proposed order.— <i>Revised proposed order submitted 7/1/14.</i>
Aff.Sub.Wit.	POH	— \$209,490.53 (\$47,590.53 is cash)	
Verified			
✓ Inventory	Administrator	— waives	
✓ PTC			
✓ Not.Cred.	Attorney	— \$7,189.81 (statutory)	
Notice of Hrg			
Aff.Mail	Costs	— \$1,645.90 (filing fees, probate referee, publication, certified copies, recorder's fees)	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			Distribution pursuant to intestate succession is to: MICHAEL JOSEPH PEREZ – [unspecified] \$47,590.53 cash , real property, and vehicle.
Conf. Screen			
Letters	010914		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			Reviewed by: LEG Reviewed on: 6/27/14 Updates: 7/1/14 Recommendation: SUBMITTED File 7 – Owens
UCCJEA			
Citation			
✓ FTB Notice			

Atty Amador, Catherine A. (for Petitioner Maria de Los Angeles Rodriguez – Step-Granddaughter)
 Atty Rindlisbacher, Curtis D. (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
 1820, 1821, 2680-2682)

		<p>TEMP GRANTED 2-25-14 EXPIRES 4-3-14, extended to 7-2-14 (Note: The Court granted authority to sell the proposed conservatee's residence and ordered bond of \$230,230.00. However, bond has not been filed and Temp Letters have not issued)</p> <p>MARIA DE LOS ANGELES RODRIGUEZ, Step-Granddaughter, is Petitioner and requests appointment as Conservator of the Person with medical consent powers and dementia medication and placement powers, and as Conservator of the Estate additional powers as specified below and bond of \$26,862.00.</p> <p><u>Voting rights affected.</u></p> <p>A Capacity Declaration was filed 1-15-14.</p> <p>An Amended Capacity Declaration was filed 5-8-14.</p> <p>Estimated value of estate: Personal property: \$2,500.00 Public assistance benefits: \$3,984.00/year Real property: \$194,800.00</p> <p>Petitioner states the proposed Conservatee resides in a care facility in Salinas, CA. She first began to exhibit signs of dementia in 2007. She attempted to commit suicide by overdose. She was hospitalized for many weeks, spent some time in rehab, and was then released to her husband. IHSS provided in home care, but she was extremely uncooperative. She did not sleep and refused to eat or shower and had temper tantrums. She was moved to Fresno and hospitalized briefly, then returned to Salinas where she was placed at the Windsor care facility by her husband in 2009. Her husband has now passed away. The proposed Conservatee is not ambulatory due to a blood clot in her leg.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The proposed Conservatee resides in Salinas, California.</p> <p>Monterey County Court Investigator advised rights on 4-2-14.</p> <p><u>SEE PAGE 3</u></p>	
Cont. from 020614, 040314				
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<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
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<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Page 2

Petitioner states the proposed Conservatee has no known biological relatives and is dependent on her husband's family, all of whom reside in Fresno County. Petitioner intends to maintain the proposed Conservatee in her current care facility and proposes to manage her real property as well. Because Petitioner resides in Fresno County, the expense associated with bringing this petition and necessary court appearances and filings will be substantially lower if the matter is filed in Fresno County. Petitioner believes minimizing the expense of the conservatorship petition and process is in the best interest of the proposed Conservatee.

Petitioner requests authority to rent or sell the proposed conservatee's home in Salinas, CA, in order to generate income for her care. No one is living in the home at present, and Petitioner is concerned it will be vandalized if left vacant.

Court Investigator Jennifer Daniel filed reports on 1-30-14, 3-27-14.

Court Investigator Michael A. Atteridge of Monterey County Superior Court filed an Investigator's Report on 5-30-14.

SEE ADDITIONAL PAGES

Page 3

NEEDS/PROBLEMS/COMMENTS:

1. The proposed Conservatee resides in Salinas, California, which is Monterey County. Need status update re Petitioner's plan to find placement for the proposed Conservatee in Fresno County.
2. Petitioner requests dementia medication and placement powers, and the Monterey County Court Investigator agrees; however, the Capacity Declarations do not support the request for dementia medication and placement powers.
3. As previously noted, Petitioner requests to either rent or sell the proposed conservatee's real property (former residence) in Monterey County; however, Petitioner does not state whether this has been discussed with the proposed Conservatee pursuant to Probate Code §2540. Need clarification. **Note:** Any sale would require Court confirmation pursuant to applicable code.
4. At hearing on 2-24-14, the Court granted Petitioner the authority to sell the real property and ordered bond of \$230,230.00. Bond has not been filed, and extended Letters have not issued. Need status update regarding the residence and the bond.

Note: If granted, status hearings will be set as follows:

- **Wed 8-20-14** 9:00 a.m. in Department 303, for the filing of the bond.
- **Wed 11-12-14** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wed 11-11-15, 2015** at 9:00 a.m. in Department 303, for the filing of the first account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

9A Donald C. Manley (Estate)
Atty Perkins, Jan T. (for Ronald D. Manley – Petitioner – Brother)
Atty Aguirre, L. Kim (for Leslie Smith Guardian Ad Litem for Noah Manley – Contestant)

Case No. 14CEPR00165

Amended Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 01/11/2009	RONALD D. MANLEY , brother/named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 9B is the Contest of Will, Objection to Probate, Objection to Appointment of Ronald Manley as Executor of Estate of Donald C. Manley filed by Leslie Smith Guardian Ad Litem for Noah Manley. Minute Order of 06/04/2014: Efforts continue to be made to resolve this matter. Minute Order of 05/07/2014: Mr. Aguirre is also appearing specially for Attorney Jan Perkins. The Court is advised that efforts are being made to resolve this matter. 1. Petition lists the estimated value of the estate at \$0. Decedent's will lists specific assets such as a 401K and a boat. Need clarification. Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Wednesday, 12/03/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Wednesday, 09/02/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Full IAEA- o.k.	
	Will dated: 09/14/2008	
	Residence: Clovis	
	Publication: The Business Journal	
Cont. from 040714, 050714, 060414	Estimated value of the Estate:	
✓ Aff.Sub.Wit.	Total - \$0	
✓ Verified	Probate Referee: Rick Smith	
Inventory	Status Report filed 06/30/2014 states the parties agreed to meet and confer about the objections on June 4, 2014. At the June 4, 2014 status conference, the parties informed the Court that they were working towards a resolution and that additional time was required. The Court extended the matter and set a new status conference for July 2, 2014. Since the June 4, 2014 status conference, the parties have continued to try and reach a resolution. Petitioner was made a proposal that has been agreed to by Crystal Manley Mobley and Cori Manly Bradt. Leslie Smith as the Guardian Ad Litem has no responded to Petitioner's proposal, but has indicated in comments to the other parties that she will not accept the proposal. It appears that a resolution cannot be reached.	
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail w/		
✓ Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
✓ Letters		
✓ Duties/Supp		
✓ Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting	Petitioner requests that the Court grant his Petition, or, in the alternative, order Leslie Smith to serve her Complaint and allow the matter to proceed.	
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: LV		
Reviewed on: 06/30/2014		
Updates: 06/30/2014		
Recommendation:		
File 9A – Manley		

9A

Dept. 303, 9:00 a.m. Wednesday, July 2, 2014

			NOAH MANLEY , by and through Guardian Ad Litem, LESLIE SMITH , is petitioner.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 06/04/2014: Efforts continue to be made to resolve this matter. Minute Order of 05/07/2014: Mr. Aguirre is also appearing specially for Attorney Jan Perkins. The Court is advised that efforts are being made to resolve this matter. 1. Opposition of will was not verified. 2. Need summons to be issued and served, with a copy of the objection. The Summons shall contain a direction that the persons summoned filed with the court a written pleading in response to the contest within 30 days of the summons. 3. Need proof of service of summons. 4. Need Order.
			Petitioner states: contestant Noah Manley is the son of the decedent. The contestant objects to the probate of the purported will on the ground that the signature on the document purporting to be the last will of the decedent is not in the handwriting of the decedent; the purported will was thus not duly executed by the decedent as required by law. Contestant objects to the appointment of Ronald D. Manley as Executor of the Estate of Donald C. Manley, the following grounds: <ul style="list-style-type: none">a. Ronald D. Manley neglected, failed and or refused to deposit the purported last will of Donald C. Manley with this court in a timely manner.b. Ronald D. Manley represented to Contestant and other heirs of Donald C. Manley that the will was of Donald C. Manley was a holographic will and, over four years after the death of Donald C. Manley, submitted a purported typewritten will to this court for probate.c. Contestant is informed and believes and based on such information and belief alleges that Ronald D. Manley has breached his fiduciary duty in that<ul style="list-style-type: none">i. Ronald D. Manley was employed as an administrator for the Don Manley 401(k) Profit Sharing Plan account with Gary Brown Construction.ii. Pursuant to the Beneficiary Designation of that Plan, upon the Death of Donald C. Manley, 50% of that 401(k) Plan was to be paid to "the trustee of the trust for Noah Manley under my last will".iii. At the time of the decedent's death, the sum of \$230,757.91 was in the 4019k) Plan. Please see additional page	
Cont. from 050714, 060414				
	Aff.Sub.Wit.			
	Verified	x		
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	x		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

- iv. Despite demands therefor, Ronald C. Manley has not provided Contestant with any accountings of the funds he received from this 401(k).
- v. Some or all of Contestant's funds from the Plan were paid directly to Ronald C. Manley at Ronald C. Manley's direction.
- vi. Ronald C. Manley has converted some or all of these funds for his personal use and benefit.

Wherefore, the contestant requests

- 1. That the purported will be denied probate
- 2. That the Public Guardian be named Administrator of the Estate of Donald D. Manley;
- 3. For costs of suit; and
- 4. For such other relief as this court deems proper.

Pro Per Alexander, Joseph (Pro Per Petitioner)
 Pro Per Sellers, Judith (Pro Per Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 4/4/2014		JOSEPH ALEXANDER and JUDITH SELLERS, children, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		40 days since DOD	
	Aff.Sub.Wit.		
✓	Verified	No other proceedings	
	Inventory	X	
	PTC		
	Not.Cred.		
✓	Notice of Hrg	I & A - Need	
✓	Aff.Mail	Need copy of Will	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Petitioners request Court determination that Decedent's 100% interest in real property located at 1121 Harvard Ave. in Clovis, and at 38 N. Woodworth in Clovis, and in personal property consisting of automobiles and household furnishings, passes to the Petitioners pursuant to Decedent's Will.	
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

1. Item 1 of the *Petition* lists only the name **JUDITH SELLERS** as Petitioner claiming an interest; however, the remainder of the *Petition* also includes the name **JOSEPH ALEXANDER**, and the *Petition* is verified by both persons. Item 1 of the *Petition* must include the name of each person claiming an interest.

2. Need original Will to be deposited with the Court pursuant to Probate Code § 8200.

3. Item 5 of the *Petition* states Decedent died testate and a copy of the Will and any Codicil is affixed as *Attachment 5 or 12a*, and Item 12a of the *Petition* also requires a copy of the Will and any Codicil. *Petition* does not but should include a copy of Decedent's Will and any Codicil as an attachment.

4. Item 8 of the *Petition* requires a *Final Inventory and Appraisal* to be attached to the *Petition*. Need *Final Inventory and Appraisal* (DE-160, 161) pursuant to Probate Code § 13152(b), which contains the real property and personal property described on *Attachment 11* to the *Petition*.

~Please see additional page~

Reviewed by: LEG
Reviewed on: 6/27/14
Updates:
Recommendation:
File 11 - Alexander

NEEDS/PROBLEMS/COMMENTS, continued:

5. Item 13 of the *Petition* states the specific property interest claimed by each Petitioner in the property as the real property on Harvard in Clovis to **JOSEPH E. ALEXANDER**, and the real property on Woodworth in Clovis to **JUDITH SELLERS**, and the remainder of the estate as **50%** to each. Petitioners may use this summary proceeding to request the Court determine Decedent's entire estate passes to them in equal shares in undivided interests (unless Decedent's Will provides for a different distribution), and Petitioners may thereafter divide the property between themselves as they agree.
6. Need proposed *Order Determining Succession to Real Property* (Judicial Council form DE-315) containing the legal description of the real property, describing the personal property, and specifying the percentage of each Petitioners' property interest.

DOD: 11/6/13 Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;"></td> <td style="width: 85%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td></td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Mail</td> <td style="text-align: center;">W/O</td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Letters</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg		✓	Aff.Mail	W/O	✓	Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		<p>DIANA MEDINA is Petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the estate: Real property- \$69,500.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, December 12, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, September 9, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 20px;"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 6/27/14</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation: SUBMITTED</td> </tr> <tr> <td>File 12 - Medina</td> </tr> </table>	Reviewed by: KT	Reviewed on: 6/27/14	Updates:	Recommendation: SUBMITTED	File 12 - Medina
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		NEEDS/PROBLEMS/COMMENTS: <div style="text-align: center; border: 1px solid black; padding: 5px; margin: 10px 0;"> <u>OFF CALENDAR</u> </div> <p>Per minute order from 6-11-14, the general hearing set for 7-2-14 is vacated and the matter is set for Court Trial on 8-12-14. See below.</p> <p><u>Minute Order 6-11-14 (Temp):</u> The petition is denied. The Court orders that counsel be appointed to represent Lorraine Keehn. The Court orders that Lorraine Keehn remain with Christine Ybarra and not be moved from Fresno County pending the next hearing. Parties are to work together with respect to obtaining a further evaluation for Ms. Keehn. Both counsel are to work on the issue of visitation. The Court orders that there be no distribution or assignment of assets pending the next hearing. Counsel is directed to prepare the order. Christine Ybarra provides contact information to the Court. The General Hearing set for 7/2/14 is vacated and the matter is set for court trial on 8/12/14. Petition denied before court trial. Set on 8/12/14 @ 1:30 p.m. Dept. 303 for: Court Trial</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc Reviewed on: 6-30-14 Updates: Recommendation: File 13 - Keehn

Atty Prado, Gloria (pro per Petitioner/paternal grandmother)

Atty Prado, Alfonso Duran (pro per Petitioner/paternal step-grandfather)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13 years		<p align="center">TEMPORARY EXPIRES 7/2/14</p> <p>GLORIA PRADO, paternal grandmother and ALFONSO PRADO, paternal step-grandfather, are petitioners.</p> <p>LILLIAN LOPEZ and ANABEL HERNANDEZ, paternal aunts, were appointed guardians on 7/3/08. The Court on its own motion terminated the appointment of Lillian and Anabel per minute order dated 5/15/14. Both former guardians consent and waive notice.</p> <p>Father: DECEASED</p> <p>Mother: OFELIA HERNANDEZ – Court found due diligence per minute order dated 5/15/14.</p> <p>Paternal grandfather: Abel Hernandez Maternal grandparents: Unknown</p> <p>Petitioners state guardianship is necessary because the minor does not have any other place to live. They are his grandparents and they love him.</p> <p>Court Investigator Samantha Henson's Report filed on 6/25/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on: <ol style="list-style-type: none"> a. Elijah Hernandez (minor age 13) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Abel Hernandez (paternal grandfather) b. Maternal grandparents 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
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✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
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✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
✓	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 6/27/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Hernandez</p>		

Pro Per Dassori, Edward J. (Pro per Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 10/19/2013	EDWARD J. DASSORI, son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	1. <i>Petition</i> was filed with a fee waiver. Filing fees are due prior to distribution of property from an estate. Therefore, filing fee of \$435.00 is due prior to the order for distribution being processed for Petitioner.
Cont. from		2. Need proof of mailed service of the <i>Notice of Hearing</i> for all persons listed in Item 14 of the <i>Petition</i> pursuant to Probate Code § 13153.
Aff.Sub.Wit.	Other proceedings commenced; need required information	
✓ Verified		3. Item 1 of the <i>Petition</i> does not indicate that personal property is included in Petitioner's request; however, personal property is stated on <i>Attachment 11</i> as part of Petitioner's request.
Inventory	X	
PTC	I & A - Need	4. Item 2a and 2b of the <i>Petition</i> is incomplete regarding date and place of Decedent's death.
Not.Cred.		
Notice of Hrg	X	5. Item 5 of the <i>Petition</i> states Decedent died testate and a copy of the Will and any Codicil is affixed as <i>Attachment 5 or 12a</i> . (Item 12 of the <i>Petition</i> is incomplete regarding a Will of Decedent.) <i>Petition</i> does not but should include a copy of Decedent's Will and any Codicil as an attachment.
Aff.Mail	X	
Aff.Pub.		~Please see additional page~
Sp.Ntc.		
Pers.Serv.		Reviewed by: LEG
Conf. Screen		
Letters		Reviewed on: 6/27/14
Duties/Supp		
Objections		Updates:
Video Receipt		
CI Report		Recommendation:
9202		
Order	X	File 15 - Dassori
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

NEEDS/PROBLEMS/COMMENTS, continued:

6. Need original Will of the Decedent to be deposited with the Court pursuant to Probate Code § 8200. Deposit fee of **\$50.00** will be due from Petitioner prior to the order for distribution being processed for Petitioner.
7. Item 7 of the *Petition* states that proceedings for the administration of Decedent's estate have been commenced in another jurisdiction; however, the required information is not specified regarding the state, county, court, and case number.
8. Item 8 of the *Petition* requires a *Final Inventory and Appraisal* to be attached to the *Petition*. Need *Final Inventory and Appraisal* [DE-160, 161] pursuant to Probate Code § 13152(b).
9. Item 9a of the *Petition* is incomplete as to (2)(a) or (b) re: divorced, never married, spouse deceased (and if spouse deceased, need spouse's date of death); and *Petition* is incomplete as to (5)(a) of (b) re: natural or adopted child, or adopted by a third party; and *Petition* is incomplete as to (7) or (8) re: issue of a predeceased child.
10. Item 13 of the *Petition* states the specific property interest claimed by each Petitioner in the property is **50%** to **EDWARD J. DASSORI**, son, and **50%** to **RICHARD DASSORI**, son. Each person claiming an interest in the property of Decedent's estate must be a Petitioner. Therefore, need amended *Petition* with **RICHARD DASSORI** as a Co-Petitioner.
11. Need proposed *Order Determining Succession to Real Property* (Judicial Council form DE-315) containing the legal description of the real property, describing the personal property, and specifying the percentage of the Petitioner's property interest.

Petition for Letters of Special Administration with General Powers; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: NOT STATED	DEARIL WHITE , son, is Petitioner and requests appointment as Administrator [bond not addressed].		NEEDS/PROBLEMS/COMMENTS: The Petition is incomplete, need amended petition based on, but not limited to the following: 1. Need Publication. 2. Need Notice of Petition to Administer Estate and proof of service by mail at least 15 days before the hearing of Notice of Petition to Administer the Estate to all interested parties. 3. The Petition is incomplete at items: a. 1 – either box a or b should be selected b. 2(b) – Petitioner's name should be listed here c. 2(c) – If Petitioner is requesting IAEA authority either full or limited should be selected d. 2(d) – nothing is marked regarding bond or blocked account e. 3 – need date and place of decedent's death f. 3(b) – need decedent's address at time of death g. 3(c) – character and estimated value of the estate should be completed h. 3(d) – bond/waivers of bond is not addressed i. 3(e) – Not marked whether decedent died intestate or had a will j. 5(a)(2)(b) – The petition states that the decedent had a predeceased spouse. Need name and date of death of predeceased spouse. k. 5(a)(7) or (8) is not marked whether decedent did/did not have a predeceased child l. 8 – Names and relationship to decedent of all heirs (including Petitioner) and including any predeceased children or spouse should be listed in item 8. The name Carolyn Watson is listed, however her relationship to the decedent is not stated. Note: It is strongly recommended that the petitioner seek legal advice.
Cont. from	IAEA – not marked on petition, need publication		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Decedent died intestate or had a will [petition is incomplete] Residence: Not stated Publication: NEED <u>Estimated Value of the Estate:</u> NOT LISTED Probate Referee: RICK SMITH			
Reviewed by: JF Reviewed on: 06/27/14 Updates: Recommendation: File 16 - White			

Atty **Teixeira, J. Stanley (for Tracy Cerda – daughter/Petitioner)**

Atty Boyajian, Thomas M. (Court Appointed for proposed conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate

Age: 74		<u>GENERAL HEARING 08/04/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		TRACY CERDA , daughter, is petitioner and requests appointment as temporary conservator of the person and estate without bond.		Court Investigator advised rights on 06/25/14.	
Cont. from		<u>Estimated Value of the Estate:</u>			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.	w/			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
		Petitioner states that the proposed conservatee suffers from severe dementia. Since the death of her husband on 03/18/14, her condition has worsened, but health care providers are increasingly resistant to sharing information about her care and treatment. It is also important that she obtain Social Security survivor benefits. Petitioner requests appointment without bond because the proposed conservatee's personal property is less than \$15,000.00 and her annual income from all sources is significantly less than \$2,000.00 per month thus falling under the provisions of Probate Code § 2628(a).			
		Court Investigator Samantha Henson filed a report on 06/26/14.			
				Reviewed by: JF	
				Reviewed on: 06/27/14	
				Updates: 06/30/14	
				Recommendation:	
				File 17 - Andrade	